

---

## ***Document Types and Codes***

Document types (called “document tabs” in AS/400 screens) group similar form types. Corresponding codes are used to represent each document type in the AS/400. Access for I2, I3, F2, and F3 document types are restricted to Administrators.

### **A – Contract**

- Employment contract offer
- Post-retirement employment agreement
- Request for reduced employment contract
- Service and pay advice

### **C1 – Correspondence – KHSD-generated documents, including:**

- Application for school transfer
- Leave of absence request
- Memorandum incident conference
- Memorandum of understanding
- Meritorious salary increment form letter
- Notice of non-reemployment
- Notice of reasonable assurance
- Re-employment intent/return response



- Resigned/Terminated summary sheet
- Sabbatical grant/bond
- Sabbatical leave application
- STRS certification for approval of disability benefit
- STRS reduced workload program application

## **C2 – Correspondence – Incoming Non-District generated**

- Immigration/Naturalization
- Letters written by employee
- Outside source contract (other schools' interactive education program)
- Recommendations
- Resignation letter
- Sabbatical report (from employee)
- Sabbatical request
- STRS rollover (in letter form)
- STRS employment and benefit information
- Thank you letter

## **C3 – Dr. Notes**

### **D1 – Data Forms**

- Certificated rate request
- CPR
- Deferred compensation design beneficiary
- Emergency contact information
- Employee assignment with data information
- I9
- JROTC pay and interest form
- PERS beneficiary designation
- PERS service credit
- Power of attorney
- Request for personnel action
- Request for verification of employment
- STRS election benefit plan



- Tax sheltered annuity indemnification and defense agreement
- TB cards
- TB reimbursement
- Update personal information/Change of status
- Verification of sick leave
- Voluntary deductions
- W4

## **D2 – Payroll Forms**

- 403B Retirement plan application
- Assignment authorization request
- Classified personnel assignment information
- Deferred compensation
- Degree stipend – assignment
- Direct deposit advice (state of CA)
- Hire/Rehire/Separation/Termination (employment information)
- Levy of funds – state tax board
- 50-Day Rate Increase (substitute teacher)
- PERS membership action personnel request
- Professional growth – assignment
- Retirement flex plan (elections of benefits)
- Salary deduction
- SISK-defined benefit plan/notice of termination
- Sub assignment sheet

## **E1 – Application (Employ)**

### **F1 – Evaluations**

- Substitute evaluations
- Performance evaluations

### **F3 – Restricted/Confidential**

- College Placement File
- KHSD Rating Sheet



- Privileged attorney/client correspondence
- Subpoena (miscellaneous)
- UN = Unfair Labor Practices

#### **I1 – Insurance**

- Insurance enrollment and change forms

#### **I2 – Workman's Compensation**

- Industrial medical notes
- Physician's selection
- SISK claim forms

#### **I3 – Restricted Medical**

- Dr. notes (communication from Doctor directly to District)
- Physical (pre-employment and fitness for duty)

#### **P – Pre-employment**

- 1<sup>st</sup> tax form
- Applications and supporting documents
- Authorization to deduct fingerprint fee
- Cash advance agreement
- Certificated rate request
- Classified sub check sheet
- Employee background information
- New hire setup
- New teacher check sheet
- New teacher contract information
- Offer of employment
- PERS membership form
- Request to send offer
- SISK-defined benefit plan/social security election form
- STRS – Permissive elections of STRS membership

#### **T1 – Credentials**

- Credentials (front and back)



- Credentials (out of state)
- Credentials (CLAD)
- Certificate of competence
- Certificate of eligibility
- Department of Education form (keep if no credential)
- Letter about credentials
- TCC (Temporary County Certificate) and County Receipt
- KCSOS Verification of Application fee – subs
- Waiver credential
- Credential application and renewal packet

## **T2 – Transcripts**

- CLAD exam results/ESL/ELL
- Class transcripts for professional growth (grade reports, grade cards, credit certificates)
- College transcripts
- Evaluation worksheet
- Evaluation worksheet for certificated units
- Units – letters, forms, etc....
- Verification of units

## **T3 – Miscellaneous Related Documents**

- BA/MA degree
- CBEST
- Classified college diploma
- Classified degree stipend application
- Classified professional growth application/transcripts
- Individual File Review Log
- LDS exam results
- Log: Professional growth/Degree
- National teacher exam (NTE) scores
- Placement on salary schedule (letter form/units recorded)
- PRAXIS



- Professional Record Memorandum (most recent only)
- Request to take a course
- SSAT

### **Miscellaneous Information**

**NOTE:** If you are uncertain about where a document should be placed, talk to an office supervisor.

- For best results, use only black ink on forms. **DO NOT USE PENCIL.**
- If a highlighter must be used, yellow works best. If pink or green highlighters are used, scanner brightness must be adjusted.
- Do not use dark-colored paper. Pastels are usually okay.

C	S	DATE	DOC TYPE
N	A	20000106	CORRESPONDENCE - DIST
N	A	20000106	DATA FORMS
N	A	20000106	P/R (PAYROLL)
N	A	20000106	EVALUATIONS
N	A	20000106	WORKERS COMP
N	A	20000106	PRE-EMPLOYMENT
N	A	20000502	DATA FORMS
N	A	20000530	EVALUATIONS
N	A	20000614	DATA FORMS
N	A	20040426	P/R (PAYROLL)
N	A	20040426	APPLICATION (ASSN.CHG
N	A	20000106	P/R (PAYROLL)
N	A	20080102	DR. NOTES

Records of Employee Benefits: Deanna Haulman, Insurance Specialist  
(Custodian) Kern High School District  
Personnel Division  
5801 Sundale Avenue  
Bakersfield, CA 93309

Records of Payroll:

Maintained in the Personnel  
Division and also the Payroll  
Department of the Kern High  
School District

Payroll Department  
(Custodian)

Diane Haddock, Payroll Supervisor  
Kern High School District  
Payroll Department  
5801 Sundale Avenue  
Bakersfield, CA 93309